

Large Marine Events Benefits Assessment Modeling Report



**To: RI Economic Development Corporation
315 Iron Horse Way, Suite 101
Providence, RI 02908**

**From: Planning Decisions, Inc. and
Charles Colgan, Ph.D., University of Southern
Maine**

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¹ Cover Photo by Onne van der Wal – vanderwal.com.

Introduction & Executive Summary

The purpose of this report is to help the State of Rhode Island accomplish two goals. The first is to understand the economic and fiscal impacts on the state of the America's Cup World Series (ACWS) sailing races held in Narragansett Bay off the shores of Fort Adams State Park in Newport. This innovative new format featured racing days from June 28 to July 1, 2012. The second is to gather lessons from the ACWS experience to help the state and other stakeholders better evaluate, prepare for and undertake similar large marine-related events in the future.

The ACWS event itself was a grand spectacle. State-of-the-art sailing vessels brought the modern-day America's Cup back to its original home in the United States. Over a soft opening weekend on June 23 and for four days of competitive racing from June 28 through July 1, nearly 60,000 visitors packed the grounds and shores of Fort Adams. On the final days of the competition, thousands of additional visitors packed the shores of Fort Wetherill and filled hundreds of boats on Narragansett Bay to watch the excitement. Throughout the week, the throngs of visitors filled ferries and water taxis, lined up to buy food and merchandise in Fort Adams and filled the shops and restaurants of Newport at night.



Photo: Charles Colgan

One of the most important impacts of the event was psychological as well as economic—an outpouring of pride in Newport. One visiting party was unequivocal, “We stand by our opinion that the America's Cup was THE FINEST event this state has ever sponsored!” Other comments included, “We had a great time,” “a great event,” “great for sailing in Newport,” and “events like this need to continue.” Survey results show that over 7,300 people were first-time visitors to Newport. In response to the question, “Based on your experience at this event, how likely are you to return?” with 5 being “Very likely,” the average score was 4.8.

Many visitors from the Newport area expressed great pride in having the America's Cup return to Newport. One survey respondent recounted that she had worked in the factory that made sails for the 1958 Cup winner. Another recounted being a member of the crew for the 1964 winner. Yet another visitor returning to Rhode Island for the first time since attending college thirty years earlier said he was "amazed" at the improvements made to Fort Adams.

The more purely economic impact of the ACWS event flowed from several sources of spending:

- a. spending by *visitors* who came to watch the event and, for many, stay in Rhode Island and visit other attractions;
- b. spending by *organizers and sponsors* in setting up and operating the event²;
- c. spending by *event participants*—the racing teams:
- d. spending by *the media* in setting up and covering the event.

To calculate the total of this spending and estimate its impact on the State of Rhode Island, the Rhode Island Economic Development Corporation engaged Planning Decisions, Inc. (PDI), a consulting firm from Portland, Maine, and Professor Charles Colgan, a Professor of Public Policy and Management and the University of Southern Maine. They organized and conducted an extensive, on-the-ground, visitor survey and interviewed numerous officials involved in organizing and managing the event.

The PDI team interviewed randomly selected visitors on all nine practice and racing days and in all areas of Fort Adams open to the general public. The team obtained 1,260 valid responses. This was a sufficient number to say with 97% certainty that sample answers were within +/- 2.7% of the actual characteristics of the universe of 60,000 visitors. In short, these survey results represent a statistically valid estimate of the characteristics, including spending, of visitors to the ACWS, Newport, 2012 event.

Based on this survey and the interviews conducted with event management officials, the PDI team estimated that the *direct economic impact* generated by ACWS-related

² Impact studies of other America's Cup events included state investment in docks and related waterfront properties as part of the impact. PDI did not include such investments in this analysis on the grounds that the state had planned to make the investment to upgrade Fort Adams whether or not Newport was selected to host the ACWS event.

activities (excluding spending by Rhode Island residents)³ amounted to **\$23.5 million** in sales to Rhode Island businesses. This spending supported the equivalent of 245 jobs earning an income of nearly \$7 million. In addition, the PDI team used an input-output model of the State of Rhode Island to calculate the indirect effects of this spending as it flowed through the various supply chains to vendors serving the businesses who received the direct ACWS-related spending and through the consumer spending chains associated with the workers employed as a result of this income flow.

The **total economic impact** (direct plus indirect) of the ACWS event amounted to approximately **\$38.2 million** in sales for Rhode Island businesses. These sales supported the equivalent of 345 jobs earning an income of nearly \$12 million. They also produced state general tax revenues of approximately \$2.5 million.

"I was at the flower show last week, heard about the America's Cup and decided to extend my stay."
- America's Cup visitor

A second purpose of this report was to help the state improve its ability to plan for and host similar marine-related events in the future. It did this by analyzing data gathered from the visitor survey to better understand the nature of the visitors who came to the event and by analyzing and reflecting on the hundreds of comments (both complimentary and critical) provided by visitors. This analysis will help the state learn two sorts of lessons—market lessons and organizational lessons.

a. Market Lessons: "Who will come to a marine-related event?"

- How many people?
- Coming from where?
- Staying for how long?
- Spending how much?
- Undertaking what other activities during their trips?

Survey results showed that while nearly half of visitors came from Rhode Island, a majority came "from away" and that size of party and length of stay tended to increase with distance of visitor home from Rhode Island. Thus, identifying and marketing

³ Visitor spending by Rhode Island residents was excluded from economic impact calculations on the grounds that residents would have spent some similar amount of money elsewhere in the State had they not attended the ACWS event.

more directly to those attracted “from away” to marine events holds great promise for enhancing tourist development in the state.

- b. Organizational Lessons: “How can state and event organizers improve future events?”

Survey results and supplemental comments indicate numerous areas where improvements can be made, particularly with respect to:

- improving the quality, quantity and placement of food;
- increasing the information about the event, on-site, in the community and to potential visitors prior to the event;
- improving the convenience, safety and timeliness of water transport services at the site; and
- improving coordination with the local business community to facilitate the flow of commerce between Fort Adams and the downtown.

The ACWS event in 2012 was a truly novel event. No one, either in state government or in the various America’s Cup organizations, knew what to expect in terms of organizational effort or consumer response. Given this “first time” effort, organizers have reason to feel proud of a successful accomplishment and to feel that they have accumulated the experience to make substantial improvements for future such events. By refining the market and organizational information derived from the visitor survey, the State of Rhode Island will be able to better seek out, evaluate and make the most of potential future events that could be held at Fort Adams.

Part One: Economic Impact of ACWS Newport 2012

The America's Cup World Series (ACWS) Newport 2012 race took place over a ten-day period. Preparation for the event, however, took far longer. The City of Newport, the State of Rhode Island, the America's Cup Event Authority (ACEA)—the organization responsible for managing the event, selling sponsorships and marketing, America's Cup Race Management (ACRM)—the organization responsible for running the races and managing shore-side logistics, and the America's Cup Host Committee—a group of local civic officials and leaders met twice a month for over a year to prepare for and manage the event.⁴

The economic and fiscal impact of the event, therefore, derives from far more than the events that occurred over the ten exciting, sun-drenched days in June and July 2012. Clearly, the spending by the nearly 65,000 visitors who came to Fort Adams, filled boats in the bay and crowded the shores of Fort Wetherill constitutes the event's most visible impact. But a full list of the sources of economic and fiscal impact must include:

- a. spending by *visitors* who came to watch the event and, for many, stay in Rhode Island and visit other attractions;
- b. spending by the *event organizers and sponsors* in setting up and operating the event, including both the America's Cup organization and the State of Rhode Island;
- c. spending by *event participants*—the racing teams—for transporting, housing and feeding crew, support staff and families before, during and after the event; and for transporting, preparing, maintaining and repairing racing and support vessels before, during and after the event; and
- d. spending by *the media* in setting up for and covering the event.

This report will treat each of these sources of impact in turn.

⁴ See <http://www.americascup.com/> and <http://www.latitude38.com/features/ac34.html#Management> for more detailed information on the history, organization and operation of the America's Cup.

a. Visitor Spending

Table 1 summarizes the number of visitors to the ACWS event for each day over the June 23 to July 1, 2012 period.

Table 1 ACWS, Newport, 2012 Visitor Attendance

Day	Date	Counted Visitors to Fort Adams	Estimated Boat Spectators	Estimated Fort Wetherill Spectators	Cumulative Total
Saturday	23-Jun	4,268	0	0	4,268
Sunday	24-Jun	4,653	0	0	8,921
Monday	25-Jun	closed, storm	0	0	8,921
Tuesday	26-Jun	4,419	0	0	13,340
Wednesday	27-Jun	5,763	0	0	19,103
Thursday	28-Jun	7,056	0	0	26,159
Friday	29-Jun	8,779	500	250	35,688
Saturday	30-Jun	14,720	1,000	500	51,908
Sunday	1-Jul	10,224	2,000	750	64,882
Total	9 days	59,882	3,500	1,500	64,882

Sources: Data provided by RIEDC and Khiron Security Ltd., email from John Muscat, Khiron Security, July 1, 2012.

To estimate the origins, travel party characteristics and spending of the approximately 60,000 visitors to Fort Adams, Planning Decisions, Inc. (PDI) designed and administered a survey questionnaire. The PDI team interviewed randomly selected visitors during all nine practice and racing days and in all areas of Fort Adams open to the general public. The team obtained 1,260 valid responses. This was a sufficient number to say with 97% certainty that sample answers were within +/- 2.7% of the actual characteristics of the universe of 60,000 visitors. These survey results represent the only statistically valid estimate of visitor characteristics, including spending, associated with the ACWS, Newport, 2012 event.⁵

"A nice way to spend the day with family."
- America's Cup visitor

Using reported spending for the categories of "lodging," "food and beverages" and "other" as well as the number of days respondents planned to stay in the Newport area

⁵ See Appendices One & Two for an explanation of the survey methodology and a list of the questions.
Large Marine Event Benefits Assessments Modeling Report

as part of this trip, the PDI team calculated that total visitor spending associated with ACWS Newport 2012 amounted to just over \$22.7 million.⁶ This total includes spending for the estimated 1,500 visitors to Ft. Wetherill who were assumed to exhibit the same spending pattern as respondents reporting Newport County Rhode Island as “home” and for the estimated 3,500 harbor boat viewers who were assumed to exhibit the same spending pattern as respondents who reported spending the night on a boat.

Since it is important to know the total spending generated by attendees coming from outside Rhode Island, PDI subtracted spending reported for lodging located outside Rhode Island and the total spending of those attendees who reported “home” as being in Rhode Island. Table 2 summarizes these results.

Table 2 Visitor Spending by Category & Residence

Spending Category	Total Visitor Spending	Less RI Resident Spending*	Spending by Non-RI Residents
Lodging	\$5,165,665	\$106,115	\$5,059,550
Food & Beverage	\$9,709,577	\$1,379,501	\$8,330,076
Other	\$7,834,832	\$1,170,486	\$6,664,346
Total	\$22,710,074	\$2,656,103	\$20,053,971

Source: PDI Visitor Survey; *includes non-Rhode Island residents who reported staying in a hotel/motel outside Rhode Island.

In short, while total attendee spending associated with the event was approximately \$22.7 million, the amount spent by visitors coming from outside Rhode Island was just over \$20 million. For this report, only non-local spending, i.e., spending made by non-Rhode Island residents, was considered to be the source of the economic impact of the event on the state. Similarly, only the spending made in Rhode Island by the organizations noted above is counted toward the total direct impact of the event on the State.

⁶ To estimate total visitor spending, PDI calculated per person per day spending for each spending category—lodging, food and other (largely transportation and retail shopping)—by dividing total party spending by party size to derive an estimated spending per person per day and multiplying by the number of days each party reported it planned to spend in the Newport area as part of this trip. For lodging, PDI assumed double occupancy for reported per room rates when party size exceeded a single person.

b. Expenditures by the Event Organizers and Sponsors⁷

The second category associated with the ACWS that generated economic and fiscal impact for the State of Rhode Island was the spending of the event organizers and sponsors. It is important to add a note of caution in explaining these expenditures. The America's Cup Event Authority (ACEA) as an organization engaged Game Day to staff a store on site to sell ACWS merchandise, other sponsors set up stores to sell apparel, beer and champagne. In addition, ACEA leased space in Fort Adams for local food vendors. To estimate the sales at these stores as an independent impact item while also estimating total visitor spending on food and shopping would involve double counting.

"I haven't seen Fort Adams since I was here in school 30 years ago. I'm amazed at the improvements." - America's Cup visitor from Florida

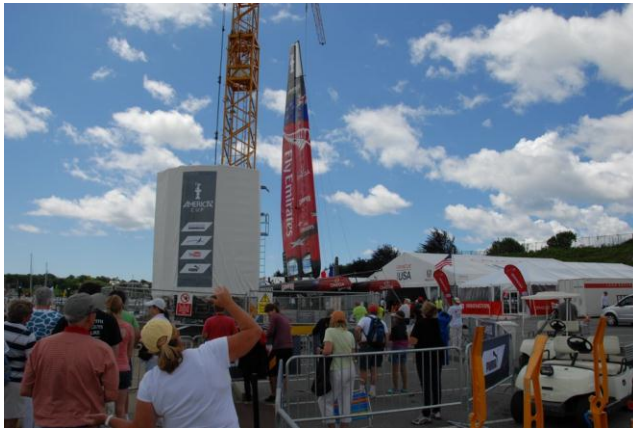


Photo: Charles Colgan

Therefore, the only spending listed here for calculation of economic impact is that associated with setting up and managing the event itself. This spending included the shared cost of the crane used to lift and move boats (a portion of which was paid by the State of Rhode Island) plus the cost of preparing the site for the event, including preparing the grounds, putting up and taking down signs, water

dispensers, trash containers, sponsor store sites, the big screen monitor and sound system and two restricted sponsor viewing/entertainment areas. They also included America's Cup paid staff and the cost of catering restricted entry events and locations (the enclosed viewing area and associated food & drink area—Club 45). This category of spending also included the cost of security provided before, during and after the event. Finally, there was the cost of support vessels—boats for marking starting and finish lines, for timing, for safety and for carrying race officials.

"The Jumbotron is great." – America's Cup visitor

⁷ No attempt is made here to distinguish between the expenditures of the event organizer America's Cup Event Authority (ACEA) and the sponsors it recruits to help defray event costs in return for the advertising value obtained for being associated with America's Cup racing. Economic and fiscal impact flows from spending regardless of the source of the funds used to pay for the spending.

Again, only expenditures made in Rhode Island are included here. Based on interviews with America's Cup staff and Rhode Island officials, PDI learned that set-up and break-down of sponsor entertaining areas was provided by a company from Texas and that recycling & water services were supplied by a company from Massachusetts, so only local hires and local spending of these companies was included in calculations of Rhode Island economic impact.

Combining this information with data from the impact studies conducted of other America's Cup events, PDI estimated that the impact generating expenditures of the event organizer/sponsor (including those paid by the state) was over \$1.6 million, split approximately evenly between the state and ACWS organizations. Table 3 summarizes the components.

Table 3 Estimated Expenditures for ACWS Organization/Operation

Sector	Estimated Spending in Rhode Island
Commercial printing	\$40,942
Water transportation	\$167,101
Truck transportation	\$148,621
Gasoline & Diesel Fuel	\$30,000
General Merchandise Stores	\$37,748
Equipment Leasing	\$76,158
Photographic Services	\$2,772
Security Services	\$80,115
Site Set Up & Disassembly	\$145,000
Waste Management Services	\$24,672
Hotels and Lodging Place	\$112,500
Food & beverage services	\$525,139
Shuttle Bus Service & Ambulance	\$19,599
State & Local Police	\$226,396
Total	\$1,636,763

Sources: Data provided by officials from ACEM and the State of Rhode Island, review of studies of prior America's Cup events and estimates made by PDI.

c. Expenditures by Event Participants

The third category associated with the ACWS that generated economic and fiscal impact for the State of Rhode Island was the spending of the event participants—the racers, their support staff and families. According to ACEM officials, ACWS, Newport, 2012 included seven teams encompassing 175 members and support

*“People in Newport
were very friendly
and helpful.”
America’s Cup
visitor*

staff and approximately 95 family members.⁸ Five teams rented hotel rooms, and two rented private homes for their stays in Newport. The average duration of stay was ten days/nine nights. Six teams had catering services on site, but each used them to varying degrees, some serving three meals and some just lunch. Some teams had meals delivered. Considering total expenditure

per person per day, one ACEM official estimated \$400 considering only accommodation and meals. Another estimated \$550 including local transport and shopping. Finally, PDI assumed a \$75 per day cost for fueling, operating and maintaining support vessels.

Based on these reports and review of the economic impact reports prepared for San Francisco by Allianz and The Bay Area Council, PDI estimated expenditures by race participants to be approximately \$1.2 million.⁹ Table 4 provides the details.

Table 4 Estimated Expenditures by Racing Teams

Item	Cost per Unit	Total Spending
Accommodations		
Hotel Room	\$450/room	\$520,000
Rented Home	\$5,000/stay	\$96,000
Meals	\$100 per person per day	\$270,000
Transport	\$35 per person per day	\$94,500
Shopping	\$65 per person per day	\$175,500
Support Vessels	\$75 per day	\$10,500
Total		\$1,166,500

Sources: Data provided by ACEM officials and estimates made by PDI.

⁸ Email from Hannah Davis, America’s Cup, Communications/Team Liaison, August 28, 2012.

⁹ Allianz Economic Impact Report into the America’s Cup, no date, p. 68-71, www.allianz.com/americacup; Bay Area Economic Council Economic Institute & Beacon Economics The America’s Cup: Economic Impacts of a Match on San Francisco Bay, 2010, p. 17.

d. Expenditures by the Media

The fourth category associated with the ACWS that generated economic and fiscal impact for the State of Rhode Island was spending associated with media coverage of the event. According to ACEM officials, the number of media representatives covering ACWS, Newport, 2012 was 148.¹⁰ Assuming a like number of cameramen and technicians and nine days for the event yields 2,664 media person days. To estimate the local expenditures associated with these people, PDI used the per person per day expenditures reported in the Bay Area Council's Economic Impact Study of the America's Cup on San Francisco.¹¹ Table 5 summarizes these results.

Table 5 Estimated Expenditures by Media

Sector	Estimated Spending
Accommodations	\$100,000
Food & Drink	\$50,000
Local Transport	\$43,000
Retail	\$128,000
Leisure	\$100,000
Telecommunications	\$14,000
Equipment Rental	\$57,000
Technical Consulting	\$128,000
Total	\$620,000

Sources: Data provided by ACEM officials and estimates made by PDI

¹⁰ Email from Daniel Ferrando, America's Cup Race Management, Media Services, August 29, 2012.

¹¹ Bay Area Institute, p. 46.

e. Direct ACWS, Newport, 2012 Related Spending

Summing the spending from all four sources of economic impact brings direct ACWS related spending to over \$23 million. Table 6 summarizes the totals for each category.

Table 6 Estimated Total ACWS-related Expenditures

Category	Estimated Spending
Visitor Spending	\$20,054,000
Event Organizer/Sponsors	\$1,636,800
Event Participants	\$1,166,500
Media	\$620,000
Total	\$23,477,300

Sources: Data provided by ACEM officials and estimates made by PDI.

Table 7 summarizes the same total by the various business sectors that received this spending as sales revenue.

Table 7 Estimated Total ACWS-related Expenditure, by Business Sector

Business Sector	Revenue Received
Food & beverage services	\$9,175,200
General Merchandise Stores	\$6,105,000
Hotels and Lodging Place	\$5,889,000
Gasoline stations	\$855,700
Water transportation	\$488,100
State & Local Police	\$226,400
Truck Transportation	\$148,600
Site Set-up & Disassembly	\$145,000
Equipment Leasing	\$133,000
Computer Consulting Services	\$128,000
Security Services	\$80,100
Commercial Printing	\$41,100
Waste Management Services	\$24,700
Shuttle Bus /Ambulance	\$19,600
Telecommunications	\$15,000
Photographic Services	\$2,800
Total	\$23,477,300

Sources: Data provided by ACEM officials and estimates made by PDI.

Total Impact of ACWS, Newport, 2012 Related Spending

The approximately \$23.5 million listed in Table 8 represents the **direct** economic impact on the State of Rhode Island of the spending that flowed into the state because of the ACWS event. This direct spending, in subsequent rounds of commercial activity, generated *indirect impacts*. These were the sales made by businesses down the supply chain selling to the direct businesses—cleaning services for hotels, food suppliers for restaurants, phone and utility companies, banks, insurance and real estate companies and on down the various supply chains until spending reached businesses outside of Rhode Island.



Photo: Charles Colgan

At the same time, the employees of the businesses involved in the ACWS event and the employees of all the indirect suppliers noted above spent for their own households, for rent, food, clothing, health care and other household items. These expenditures constituted the *induced impacts* of both the direct and indirect spending.

Together, the direct plus indirect plus induced impacts constitute the **total economic impact** of the event on the Rhode Island economy. Attempting to measure all these effects individually would be virtually impossible. No officially available statistics measure these inter-industry supply chain and consumer spending relationships at the state or local level. Short of exhaustive direct business surveys, there is no direct way to obtain an accurate measurement of these trickle down or “multiplier” effects. The only cost-effective way to measure an industry’s or a project’s total impact is to use an input-output model explicitly designed to capture those interconnections. The PDI team used the IMPLAN model of the State of Rhode Island to measure these effects.¹²

¹² IMPLAN (IMpact Analysis for PLANing) is a computer based input-output modeling program originally developed by the U.S. Department of Agriculture Forest Service for resource management planning. It contains a mathematical representation of the purchasing patterns that take place between sectors of an economy. Built into the IMPLAN data files are all of the industry sales, employment and income data for each sector of the Rhode Island economy. IMPLAN uses these data along with national purchasing patterns (national input-output matrices) to create state models. Data presented here are rounded to avoid the appearance of unwarranted precision.

Table 8 presents a summary of the IMPLAN model run for the direct spending totals listed in Table 7.

Table 8 Total Economic Impact of ACWS, Newport 2012

Activity	Sales	Jobs	Income
Direct Impact	\$23,477,300	245	\$6,810,000
Indirect Impact	\$6,475,000	40	\$2,315,000
Induced Impact	\$8,290,000	60	\$2,817,000
Total Impact	\$38,242,300	345	\$11,942,000
Multiplier	1.6	1.4	1.8

Source: IMPLAN model of Rhode Island operated by Planning Decisions, Inc.; numbers are rounded to avoid implying false precision.

The indirect (supply chain) impact of ACWS, Newport, 2012 amounted to nearly \$6.5 million in sales for Rhode Island businesses. These sales supported the equivalent of 40 jobs earning an income of approximately \$2.3 million. The major industrial sectors that received these sales were real estate, business services, electric power generation, telecommunications, restaurants and drinking places, insurance, banking, advertising and accounting services.

The induced (consumer spending) impact of the direct and indirect spending generated nearly \$8.3 million in sales for Rhode Island businesses. These sales supported the equivalent of 60 jobs earning \$2.8 million in income. These sales, as would be expected given general patterns of consumer spending, went to hospitals & medical services, grocery stores, restaurants, real estate and smaller fractions to general merchandise retail stores, telecommunications, banking and electric power generation.

The total economic impact of the ACWS event on Rhode Island thus amounted to more than \$38 million in sales for businesses in the state. These sales supported the equivalent of 345 jobs earning an income of nearly \$12 million and generating state general revenues of approximately \$2.5 million¹³.

¹³ Based on data provided by the Rhode Island Office of Revenue Analysis relating state general revenue to estimated gross state product for 2012; email from Paul Dion, Chief, Office of Revenue Analysis dated December 19, 2012..

This impact is reflected in trends in municipal tax collections based on hotel and meals and beverage sales. Total tax receipts in Newport County for both meals and beverage sales and for hotel sales were up substantially in 2012 compared to 2011. Table 9 illustrates these patterns.

Figure 9 Local Meals & Beverage and Hotel Tax Receipts, Newport County

Municipality	June 2011	June 2012	% Change
a. Newport County Local Meals & Beverage Tax Receipts			
Jamestown	\$8,245	\$10,926	32.5%
Middletown	\$53,539	\$76,668	43.2%
Newport	\$164,817	\$250,860	52.2%
Portsmouth	\$17,811	\$17,941	0.7%
Total	\$244,412	\$356,395	45.8%
b. Newport County Local Hotel Tax Receipts			
Jamestown	\$544	\$623	14.5%
Middletown	\$23,786	\$34,865	46.6%
Newport	\$63,354	\$60,003	-5.3%
Portsmouth	\$273	\$677	148.2%
Total	\$87,956	\$96,168	9.3%

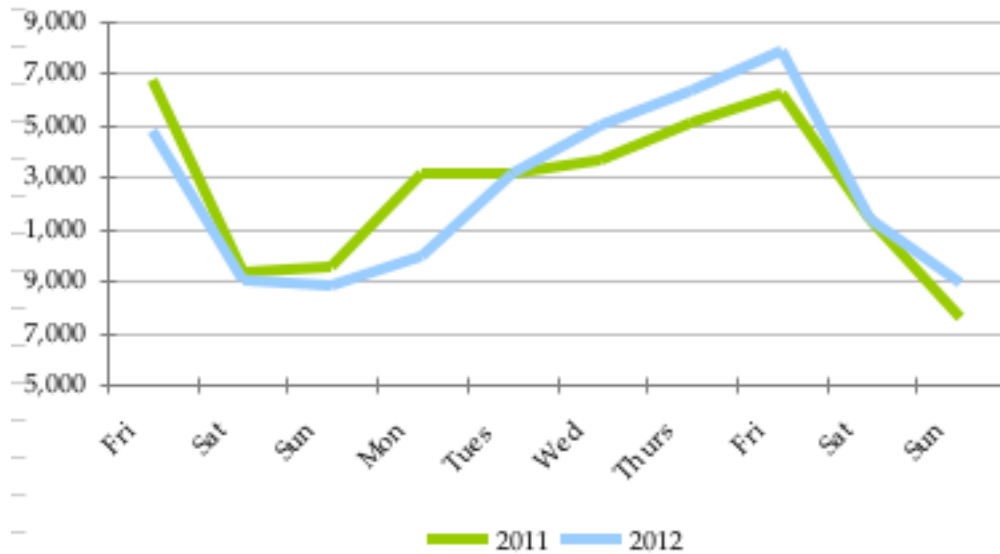
Source: Rhode Island Department of Revenue, Local Revenue Briefs and Reports, <http://www.dor.ri.gov/Revenue%20Briefs/>.

Another indicator of how the ACWS event may have affected the larger Rhode Island economy, is traffic volume over the Newport-Pell bridge for the comparable period in 2011 and 2012. Figure 1 illustrates both the weekly pattern of traffic and the change in 2012 compared to 2011. In 2012, the ACWS event ran from Friday, June 22 through Sunday, July 1. In 2011, the comparable Friday to Sunday period ran from Friday, June 24 to Sunday, July 3.

"This event was not well advertised outside of Newport."
America's Cup
visitor

Traffic in both directions for the comparable ten-day period in 2011 and 2012 generally falls to about 29,000 cars on Saturday and Sunday and rises to a peak of about 37,000 cars on Friday. In 2012, traffic was less by several thousand vehicles in the early part of the week (perhaps reflecting the severe thunderstorm that occurred on Monday, June 25, 2012 that forced closure of Fort Adams). However, from Wednesday on, traffic in 2012 exceeded that of 2011, particularly on Sunday (the day of the racing finals) when 2012 traffic exceeded 2011 traffic by approximately 1,300 vehicles.

Figure 1 Newport-Pell Bridge Traffic end of June 2011 & 2012



Source: Rhode Island Turnpike & Bridge Authority.

While neither of these peripheral indicators—rising local food and lodging tax revenues and rising bridge traffic—can be attributed solely to the ACWS event, they certainly lend support to the hypothesis that it did contribute to at least a temporary increase in local economic activity.

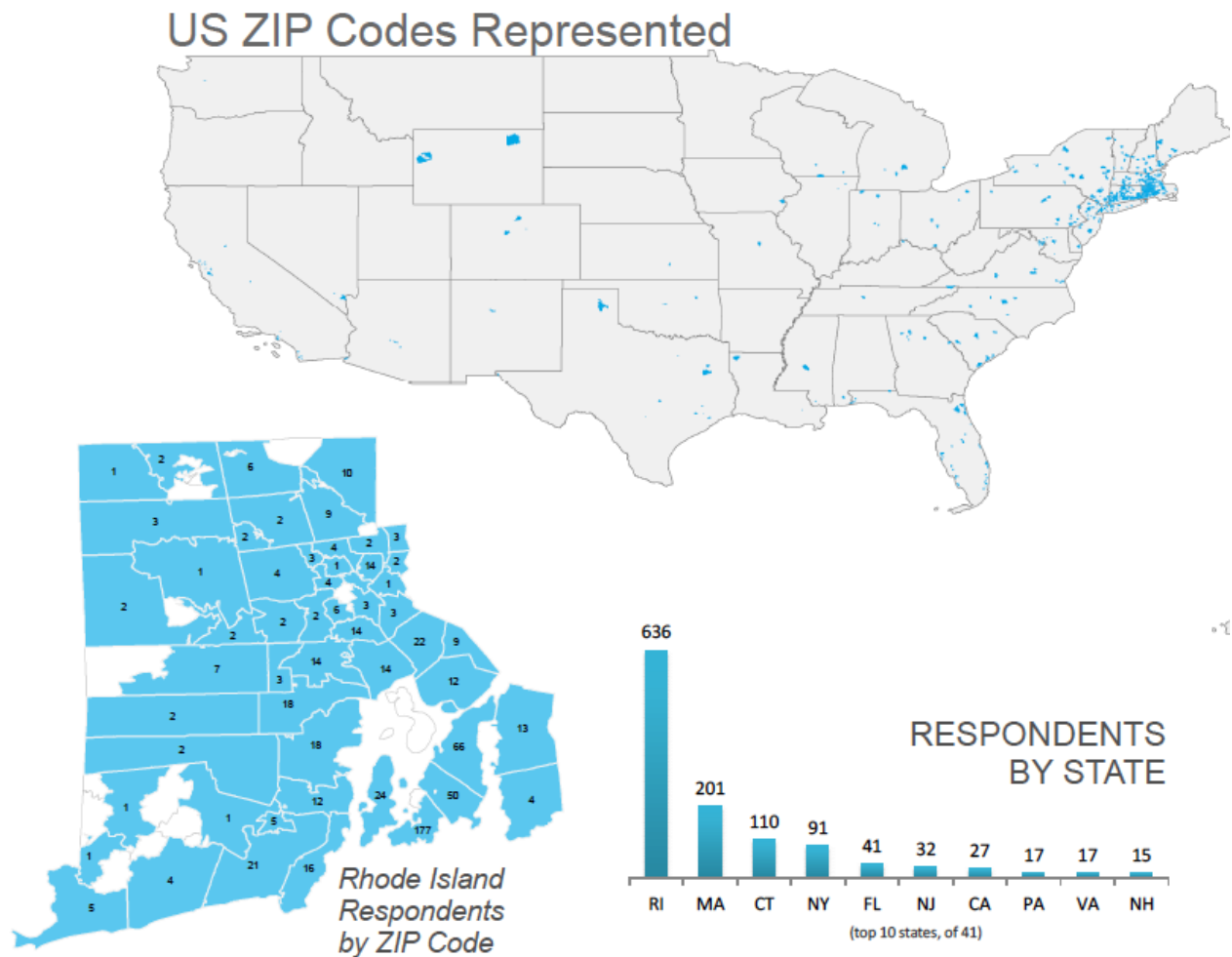
Part Two: Lessons Learned & Model for Future Marine-Related Events

a. Market Lessons: "Who will come to a marine-related event?"

Number and Location of ACWS Visitors

The ACWS created a truly worldwide draw for Newport. The visitor survey identified people from 600 unique zip codes representing 41 states as well as people from 18 countries beyond the U.S. Figures 2 maps these locations.

Figure 2 ACWS Newport, 2012, ZIP Codes Represented

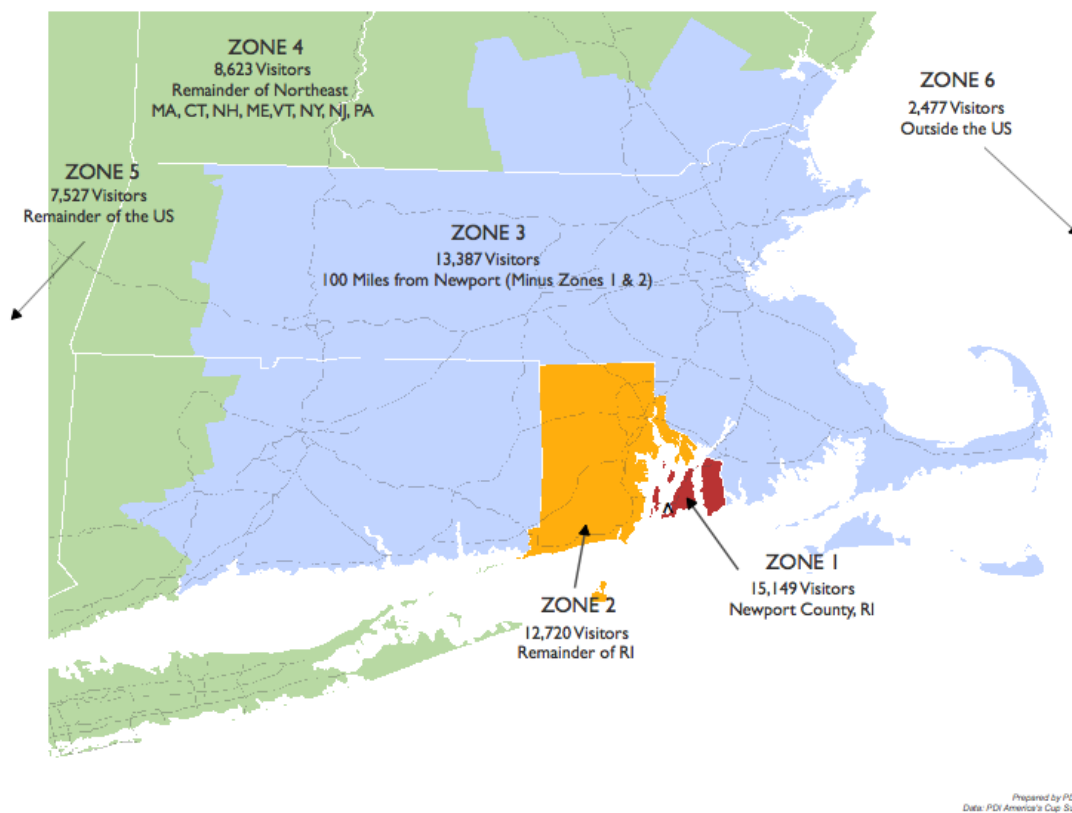


Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

In order to further refine the analysis of visitor characteristics and behavior, PDI grouped responses into six zones based on distance from Newport. Zone 1 consists of Newport County, Rhode Island. Zone 2 consists of the remainder of Rhode Island. Zone 3 consists of portions of Connecticut, Massachusetts and New Hampshire that are within roughly 100 miles of Newport.¹⁴ Zone 4 consists of the remainder of the Northeast region of the U.S. Zone 5 consists of the remainder of the U.S., and Zone 6 includes visitors from outside the U.S. Figure 3 depicts these zones and the estimated number of visitors from each.

A couple who sail from Maine to Florida every year said they come to Newport every year anyway but decided to stay longer because of the America's Cup—
PDI staff

Figure 3 Visitors to ACWS, Newport, 2012 by Geographic Area



Source: PDI Visitor Survey.

¹⁴ Some visitors from Long Island, NY may have taken a ferry to Connecticut and thus been within a 100-mile drive of Newport. However, since this information was not evident in survey responses, the PDI team allocated Long Island zip codes to Zone 4.

One of the most important pieces of information to be drawn from any visitor survey is to see how visitor characteristics change with place of origin. How do spending patterns, size of party and duration of visit vary with distance traveled? Knowing the characteristics of ACWS visitors will help the state evaluate the likely impacts of future potential users of Fort Adams and will help those seeking to use the venue better define and reach out to their desired markets. Table 10 lists key characteristics of visitor parties by zone of origin.

Table 10 ACWS Newport, 2012, Characteristics of Visitors by Zone

Home Zone	Avg. Spending per Person per Day			Avg. Party Size	Avg. Days in Newport
	Lodging	Food	Other		
1	\$0	\$34	\$27	3.2	1.5
2	\$3	\$33	\$32	3.3	1.7
3	\$21	\$44	\$31	3.9	2.3
4	\$60	\$62	\$49	3.5	3.2
5	\$68	\$64	\$47	5.1	4.9
6	\$84	\$53	\$67	3.2	5.0

Source: PDI Visitor Survey.

From the perspectives of both total spending and economic impact, the most important facts evident in Table 10 are:

- That spending, both by category and in total per person tends to increase with distance from Newport;
- That the number of days visitors plan to spend in the Newport area tends to increase with distance from Newport; and
- That average party size is somewhat larger for zones 3 and 5.

Size of ACWS Visitor Parties

An important component of visitor studies is party size—number of people in the traveling group. For ACWS, Newport 2012, party size varied from single person parties (of which there were 125 or 9.9% of all respondents) to highs of 195 (a group from the Naval War College) and 160 (a bicycle tour from Massachusetts that had no idea that the America's Cup was scheduled but decided to come to Fort Adams for a day after

they arrived in Newport). The median (half larger/half smaller) and modal (most common) party size was 2. The average party size was 3.5 (pulled up by the larger groups). The total number of people represented by those surveyed amounted to 4,434. Table 11 presents the distribution of parties surveyed by party size.

Table 11 ACWS Newport, 2012, Distribution of Parties by Party Size

Party Size	# of Parties	% of Parties
No response	3	0.2%
1	125	9.9%
2	542	43.1%
3	182	14.5%
4	207	16.4%
5	68	5.4%
6	58	4.6%
7	25	2.0%
8	6	0.5%
9	10	0.8%
10+	33	2.6%
Total	1,259	100.0%

Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

While the vast majority of visitors came to the ACWS in groups of 1 to 4, it is worth

“Our business meeting was planned to be in Newport and at this time because of the Americas’ Cup.”—America’s Cup visitor

noting that many of the larger groups represented larger family gatherings, including family reunions and weddings. Anecdotal evidence gathered from visitor comments not part of the quantitative survey indicated that some groups planned reunions and family visits with the ACWS in mind as an interesting “thing to do” during a family gathering planned independently. Other groups, like the bicycle travelers from Massachusetts, simply found out about the ACWS while they were in Newport and decided to come.

First-Time Visitors

Beyond the impact of the event itself, the most important opportunity for the State of Rhode Island is to find ways to bring back first-time visitors. Based on survey results, the ACWS brought over 7,300 first-time visitors to the state. These visitors, moreover,

left with an overwhelmingly positive feeling toward Newport. One survey question asked visitors to rate the likelihood of a return visit based on their experience at this event. On a 1 to 5 scale (1 being “very unlikely to return” and 5 being “very likely to return,” first time visitors recorded an average score of 4.80.

“This event is great exposure for Newport.”
– America’s Cup visitor

It is striking, however, that the average “likely to return” score declined with distance from Newport. Most of this difference is likely to reflect the improbability of another long trip to Newport rather than a negative attitude toward the area. Nonetheless, the data do indicate that there is room for improvement in bringing visitors “from away” up to the level of affection Rhode Islanders feel toward this region. Table 12 illustrates these trends.

Table 12 First-time Visitors & Likely to Return Scores by Zone

Home Zone	Estimated First Time Visitors		
	% of Visitors from Zone	Estimated First Time Visitors	Avg. “Likely to Return” Score
1	0.3%	48	5.00
2	1%	143	4.97
3	4%	469	4.92
4	28%	2,414	4.80
5	36%	2,710	4.75
6	63%	1,561	4.19
Total	12%	7,344	4.80

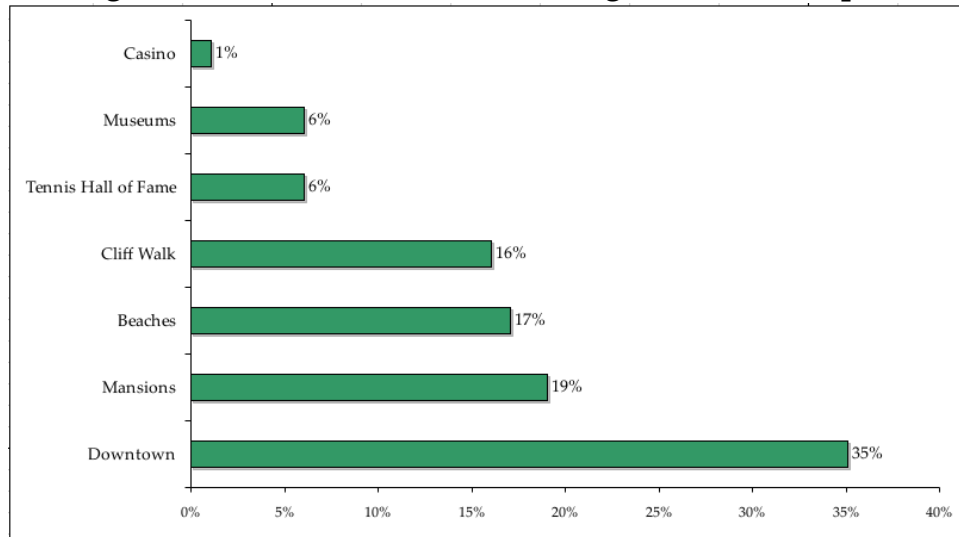
Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

Things To Do

One of the survey questions presented visitors with a list of possible things to do in the Newport area and asked respondents which they would be likely to visit. Clearly, downtown Newport for shopping and restaurants was the first choice. Second choices were The Mansions, the Cliff Walk and the beaches. Smaller numbers were likely to visit local museums or the Tennis Hall of Fame, and very few said they were likely to visit the casino. In addition, many respondents mentioned other attractions they were likely to attend or activities they were likely to undertake. These included sailing,

biking, golfing, flower garden visits, chartered boat tours, baseball games and a long list of other activities. Figure 4 illustrates the relative preferences among the most common choices.

Figure 4 Visitor Preference for Things to Do in Newport



Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

Market Segments

Data collected by the visitor survey permits a detailed analysis of key characteristics of visitors that may apply to other marine related uses of Fort Adams. By understanding the various visitor types summarized above, the State can better prepare for and market to specific segments of the public that may be attracted to future marine-related events. In addition careful review of these survey data can help the state formulate questions for organizations like the America's Cup Event Authority that may wish to use Fort Adams in the future. Finally, the State may want to use the current survey as a foundation upon which to design and conduct similar surveys at future events.

*"Get this here
again!!"—
America's Cup
visitor*

b. Organizational Lessons: Ways to improve future events

Visitor Comments

In addition to completing the formal visitor questionnaire, PDI survey takers made notes of unsolicited attitudes and opinions expressed by respondents as well as notable characteristics of the party interviewed. We also received eight additional comments by email after the event. In total, we received 353 comments and notes from 324 parties. Table 13 presents a summary by category of comment and topic addressed.

Table 13 ACWS, Newport, 2012, Visitor Comments by Category & Topic

Topic	Compliment	Complaint	Suggestion	Note	Total
Access	5	10	4	0	19
Admission	4	3	6	0	13
Advertising	0	7	9	1	17
Conveniences	8	14	23	0	45
Food/ Drinks	7	30	44	1	82
General	27	0	0	4	31
Information	3	25	16	0	44
Miscellaneous	0	0	25	0	25
Parking	0	13	0	0	13
Party Info.	4	0	0	15	19
Retail	0	6	5	2	13
Transportation	1	10	3	2	16
Venue	11	0	4	1	16
Total	70	118	139	26	353

Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

After analyzing the responses, PDI divided them into the thirteen topics listed in column 1 of Table 13. Finally, there were an additional 51 comments that elaborated on a topic. The majority of these elaborations dealt with the quantity, quality, variety or price of food offerings or the presence, absence or nature of signage and general information about the venue, the food offerings or the racing events.

The majority of complimentary comments were general. They ranged from “great event,” “great venue,” “great to see AC back in Newport” to the event “was THE

FINEST event this state has ever sponsored!” Others gave positive commentary on the venue, the conveniences, the water taxis, the signage and the attractiveness of the event to families. In general, all PDI staff came away from their work with a sense that people felt a great deal of pride in their community for winning, hosting and managing such a wonderful event. This feeling was generally followed with an expression of hope that similar events will be held in the future.

*“Make it easier
to get to the
bathrooms.”—
America’s Cup
visitor*

In a broad sense, visitor complaints centered around three broad subjects—information, access/parking/transportation and food and drinks. These concerns present a great opportunity for the state to make changes to improve such events in the future.

The problem with information could be divided into two parts—information available prior to coming to the venue and information at the venue. In general, those who complained expressed frustration that they could not find information about timing of events, pricing of parking and admission and information about water transport before they came to the site. There were a number of complaints about learning on site that what they had been led to believe from off-site sources proved not to be true. This was particularly animated from those who brought coolers and from those who tried to enter from the “back” side of the parking lot. On site, many complained that signs were too small, too scattered and too few. Others complained that information about what racing events were taking place when was not readily available. A few complained about the absence of race result and standings information.

Complaints about transportation not related to the confusion about information and pricing of parking dealt with distance from the event and access for those with disabilities. Some complained about uncontrollable items such as bridge tolls and construction. Finally, there were a number of complaints about the several hour delay getting out of the upper parking lot after the thunderstorm that followed the very end of the event. There appeared to be no traffic management at all, leading many cars to try to exit by going down the hill from the soccer field or up the hill onto the Army base.

*“Not easy to
get in for
elderly and
disabled.”—
America’s
Cup visitor*

The major area of complaint was food and drink. Many visitors felt that there was too little quantity and variety and that the food location was inconvenient—far from the

entry and race-watching areas. Many complained about lack of adequate food-signage, but relatively few complained about quality or price.

Suggestions for Improvement

In looking to the future, the state should focus on several areas:

“Understaffed food vendors and not enough food.” – America’s Cup visitor

1. Food:

The largest number of complaints received during the ACWS concerned food. Because this was a first time event, no one knew how many visitors to expect and thus how much of a commitment to make to number of food vendors and volume of food available. In addition, virtually all of the event organization and management decisions were made through negotiations between the State and both of the America’s Cup organizations—America’s Cup Event Authority and America’s Cup Race Management. With the ACWS experience in hand, the state will be better prepared to negotiate with potential sponsors regarding all aspects of the event.

2. Information:

The second area where the state can make improvements for future events is in communications: better and more frequent placement of bigger signs indicating both the locations of events and amenities and announcing the nature and schedule of planned events. A second area of information is in marketing the event. Better knowledge of potential attendees and their origins would help the State better publicize future events.

3. Transportation:

Because the ACWS event was so successful, it generated bottlenecks both in the parking areas and on the water taxi/ferry docks. Better pre-event publicity about transportation arrangements, particularly for those with mobility-limiting disabilities would be an improvement.

4. Communications with Local Merchants:

Based on the ACWS event, it would be wise for the State to work closely with local business organizations to brainstorm reactions to the events of 2012 to find ways to increase the potential commercial spin-offs of events at Fort Adams. Coordination of event and shopping times, advertising of downtown specials in event brochures, signs at ferry landing areas directing visitors to shopping areas were all suggestions made by visitors.

Part Three: Appendices

Appendix One: Visitor Survey Questionnaire

1: in what capacity did you come to the event today?

- As a volunteer
- As paid staff
- As a race observer
- As a guest of a corporate sponsor
- As a visitor but not here to see the America's Cup

2: Are you a permanent or seasonal resident of the Newport area? (clarify if necessary, includes Newport-Middletown-Jamestown)

- Yes
- No

3: Is this your first visit to Newport?

- Yes
- No

4: Are there any other area attractions you plan to visit while you are in Newport?

- Yes
- No
- Don't Know (DK)

5: Could you indicate which ones you plan to visit on this trip?

- Newport Mansions
- Naval War College
- Newport Beaches
- Newport Grand (slots)
- Lighthouses
- Tennis Hall of Fame
- Museums
- Other (specify)

6: How many days will your party be attending the America's Cup event

- Select 1 2 3 4 5 6 7
- More (specify) ____

7: Based on your experience this visit, how likely are you to visit Newport again?

- 1 = not likely
- 2
- 3
- 4
- 5 = very likely

8: Do you or anyone else in your party sail as a sport or hobby?

- Yes
- No

9: What is your home zip code? (5 digit)

10: How many people are in your party?

11: Where did your party spend last night?

- At home
- In a hotel, motel, B&B in Rhode Island
- In a hotel, motel, B&B not in Rhode Island
- In a private residence other than my home.
- On a boat.

12: If a private residence not your home, was it:

- with friends or relatives?
- in your seasonal home?
- in a rented home?

13: How did you travel to the Newport area for this visit?

- Own or friend/relative's car
- Rented car
- Boat
- Train
- Bus
- Other

14: How did you travel to Fort Adams for the event today?

- Water taxi/ferry from satellite parking
- Water taxi/ferry from Newport
- Shuttle from satellite parking
- Drove and parked on site
- Walked
- Biked
- Other

15: I would like to ask you some questions about your expenses while you are visiting Newport for the America's Cup? Are you the right person from your party to answer these questions? Would you be comfortable providing that information?

- Yes
- No

16: Is there someone else in your party who could help with this information?

- Yes
- No

17. Thanks. First I'd like to ask about expenditures for lodging. I'm going to read you a set of ranges for spending on lodging. Please select the one closest to what your party spent per room last night. (Show choices)

- Less than \$100
- \$100 to \$199
- \$200 to \$299
- \$300 to \$399
- \$400 to \$499
- More than \$500
- Don't know

18. Which of the following categories comes closest to the amount that your party will spend on food today? (Show choices)

- Less than \$50
- \$50 to \$99
- \$100 to \$249
- \$250 to \$499
- \$500 to \$749
- \$750 to \$999
- More than \$1,000
- Don't know

19. Finally, I would like to ask about spending on incidentals like souvenirs, post cards, clothing, admissions, etc. Which of the following is likely closest to what your party will spend on incidentals during your visit to Newport? (Show choices)

- Less than \$25
- \$25 to \$49
- \$50 to \$99
- \$100 to \$149
- \$150 to \$199
- \$200 to \$249
- \$250 to \$499
- More than \$500
- Don't know

20. Would you like to provide your email address to be entered into a drawing to win an Onne Van der Wal photo of the 2012 America's Cup in Newport? (enter email address and show it to them to confirm before leaving this question)

21: After the America's Cup we would like to contact some visitors by email to ask some additional questions and to get a little more detail on your spending. Would you be willing to be contacted?

- Yes
- No

Appendix Two: Survey Sample, Methodology & Statistical Reliability

The survey sample was derived from in-person interviews of visitors to Fort Adams over the period from June 23, 2012 to July 1, 2012. Interviews were conducted at four major locations:

- The entrance to Fort Adams, including the water taxi dock and America's Cup display center;
- The hospitality tents, vending and large screen area at the northeast end of the Fort Adams site;
- The interior of Fort Adams;
- The shoreline viewing areas.

Interviews were not conducted among visitors on boats or at Fort Wetherill State Park in Jamestown. There were an estimated 5,000 visitors at these sites who were not sampled. The overall sample drawn should be generally representative of these other visitors. Interviews were not conducted in the two interior areas restricted to sponsor guests, namely the Club 45 area and the enclosed grandstand viewing area.

All interviewers (except Professor Colgan) were employees of Planning Decisions, Inc. (PDI) specifically trained to conduct this survey. Interviewers approached respondents, introduced themselves, explained that they were conducting a survey to help the State of Rhode Island understand the economic impacts of events such as the America's Cup and asked each respondent for permission to ask the survey questions. Compliance with the request to be interviewed was well over 95%.

Responses were recorded on iPads and uploaded to a server at the conclusion of each day. Preliminary analysis of the data was conducted over the first four days to test for any significant biases in the data.

A total of 1,260 usable responses were obtained after discarding a small number of responses that failed to upload to the server. These responses resulted in a sample with a confidence level of .97 and a confidence interval of ± 0.027 . That is, there is a 97% chance that the responses in the sample will be within plus or minus 2.7% of the actual values of the population of 59,882 visitors to Fort Adams. This would be considered a very high quality sample for this type of study.

Appendix Three: Maps of Fort Adams and Race Course

Figure A3.1 ACWS Newport 2012 Race Course



Figure A3.2 ACWS Newport 2012 Amenities



Appendix Four: Visitor Origins

Table A4.1 ACWS Newport, 2012, Countries Represented by Visitors

Country	Number of Visitors
US	1,320
Canada	11
Germany	8
New Zealand	7
Ireland	6
Australia	5
Denmark	2
England	2
France	2
Italy	2
Scotland	2
Sweden	2
Argentina	1
Belgium	1
Bermuda	1
China	1
Poland	1
South Africa	1
Spain	1
Total of 19 Countries	1,376 visitors

Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc. The number of visitors exceeds the number of survey responses because some parties had members from different countries.

Table A4.2 ACWS Newport, 2012, States Represented by Visitors

State	Unique ZIPs by State	State	Unique ZIPs by State
MA	134	AK	3
NY	79	CO	3
CT	77	DC	3
RI	56	WI	3
FL	38	HI	2
NJ	31	IL	2
CA	23	LA	2
VA	16	MS	2
PA	15	NV	2
NH	14	OK	2
TX	12	TN	2
MD	10	WY	2
ME	9	AL	1
SC	8	DE	1
VT	8	IA	1
GA	7	KS	1
OH	7	KY	1
AZ	6	MO	1
NC	6	NM	1
IN	4	WA	1
MI	4		
Total = 41 states and 600 zip codes			

Appendix Five: Visitor Comments

Table A5.1 ACWS Newport, 2012, Visitor Compliments, by Topic

Comment	Topic
access to fort good	Access
the bathrooms are fine	Conveniences
jumbotron is great.	Conveniences
impressed with solar powered trash compactors and recycling	Conveniences
oceanography tent really cool	Conveniences
the explorer tent is cool	Conveniences
the water barrels eco-friendly thing is great	Conveniences
medical tent was fabulous and very helpful	Conveniences
cost of food reasonable for this type of event	Food/ Drinks
food and selection is good	Food/ Drinks
bringing water bottles and the support of it by the event is great	Food/ Drinks
the Moet tent was fabulous	Food/ Drinks
food in the fort is nice	Food/ Drinks
great food selection	Food/ Drinks
lobster rolls are great	Food/ Drinks
Thank you for the follow-up letter. I had wondered how it turned out.	General
We still stand by our opinion that the America's Cup was THE FINEST event this state has ever sponsored!	General
we had a great time	General
We enjoyed America's Cup races and the survey was fun!	General
the young African-American woman from New York City who interviewed us was particularly poised and efficient.	General
the lady who interviewed me, she was very nice and made the questioning actually enjoyable and somewhat fun	General
America's Cup a nice way to spend the day with family	General
as a sailor its nice to see people enjoying the sport. How Newport supports sailors is really great	General
free sailing at sail Newport really fun	General
good for all ages	General
loves it as a resident	General
nice event, good to have it back in Newport. Nice to see it with the	General

kids	
doing great job	General
junior sailing program invitations great	General
friendly staff	General
great event	General
great support of the sailing industry	General
people in Newport very friendly and helpful	General
really liked the America's cup	General
educational component was great	General
events like this need to continue because they're great	General
great event	General
the event is great for exposure to Newport	General
well organized	General
seeing the boats up close is great	General
glad the state supports athletic/sailing events	General
loved the free Sail Newport event	General
good commentary and video coverage as a non-sailor who doesn't follow or know much about the sport	Information
well-organized and good labeling	Information
good signage	Information
Guy was here for a meeting but the meeting was planned to be in Newport and at this time because of the America's Cup. But for the ACWS they would have had it somewhere else	Party Info
a couple who sailed from Maine to Florida every year said they come to Newport every year anyways but they decided to stay longer because of the America's Cup	Party Info
person used to watch the 12 meter boats here. Its good to have the America's Cup back hopefully they'll bring the real one back	Party Info
party of 2 from VA came in RV. Really liked the report we were doing (economic impact study)	Party Info
water taxi is great	Transportation
family from Columbus, OH. Thought the venue was amazing	Venue
impressed with cleanliness	Venue
perfect venue	Venue
great venue	Venue
Harbor master incredibly helpful and friendly	Venue

Fort Adams great venue	Venue
great venue	Venue
proximity to the racing is great	Venue
the fort tour is great	Venue
beautiful location	Venue
having it here makes it a spectator sport (good thing)	Venue

Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

Table A5.2 ACWS Newport, 2012, Visitor Complaints, by Topic

Comment	Topic
parking official gave handicapped person a hard time after another person told them where to park because handicapped parking was full	Access
not easy to get in for the elderly or disabled	Access
walk into Fort Adams was too narrow for a wide stroller. Woman was considering not coming back because of this	Access
handicap parking is too far away from the actual event	Access
walking difficult and no handicapped assistance	Access
felt a bit like cattle coming into the fort (not enough space for all the people and cars coming in)	Access
very hard for handicapped to get in and walk around site	Access
the walk in is really long	Access
concerns about the walk from the parking area for elderly or disabled	Access
walking is too far	Access
environmental police turning people away at the top of the fort A gate. Instead there should be a person there selling tickets	Admission
had trouble buying tickets online for Sunday	Admission
ticket line too long	Admission
admissions annoying because they didn't have enough tickets and originally the group was turned away then more tickets released so then they could go in	Admission
poor advertising of the event locally	Advertising
marketing wasn't great	Advertising
not well advertised outside of Newport	Advertising
we were there on Saturday; didn't return on Sunday because of the heat; if there had been some shade anywhere near the finish line or the big screen, we would have come back;	Conveniences
not enough activities for kids	Conveniences
stopping coolers was bad	Conveniences
bleachers needed. group mentioned they would have come back if seating was better	Conveniences
seating stinks (chairs on the rocks block everyone's view behind them)	Conveniences

no stadium seating available	Conveniences
there aren't any speakers farther down the fort	Conveniences
all toilets should be the same (none better or worse) (in reference to the club 45 bathrooms)	Conveniences
no shade	Conveniences
seats for more people in the shade (especially older people)	Conveniences
helicopter noises interfere with listening to race announcer	Conveniences
not enough picnic tables	Conveniences
There aren't any monitors inside the fort	Conveniences
Taxpayer/owner of boat moored at the fort upset that he couldn't use "private" bathrooms.; heard course was reset after politicians said they couldn't see the boats well enough	Conveniences
food too far from the entry	Food/ Drinks
food is expensive (but understandable)	Food/ Drinks
drink costs too high (\$11 for wine)	Food/ Drinks
drinks too expensive	Food/ Drinks
water too expensive	Food/ Drinks
food expensive	Food/ Drinks
Bossman burgers should be better (stand food is inferior to what's available at the restaurant)	Food/ Drinks
understaffed food vendors and not enough food	Food/ Drinks
ran out of lobster rolls	Food/ Drinks
not enough food/ beverage options	Food/ Drinks
water barrels empty	Food/ Drinks
food vendors ran out of stuff	Food/ Drinks
water barrels ran out of water	Food/ Drinks
person from San Francisco said: 1 hour to get a burger is way too long; a disgrace. Lots of potential sales lost. They had better improve if they want to get the America's Cup back in Newport	Food/ Drinks
food a disaster, waited in line and then they were out of everything	Food/ Drinks
not enough food stands	Food/ Drinks
ran out of lobster rolls	Food/ Drinks
a lot of stands running out of food	Food/ Drinks
Not enough water on sight	Food/ Drinks
not enough food tents	Food/ Drinks
this group spent 30 mins looking for the food	Food/ Drinks

need more food options	Food/ Drinks
too few choices in beverages	Food/ Drinks
there isn't a water that you can buy	Food/ Drinks
foods options are gross	Food/ Drinks
no coffee on site	Food/ Drinks
people volunteering at Sail Newport aren't getting free lunch	Food/ Drinks
alcohol in separate locations difficult. People in one party want to drink different things but cant go from one beverage tent to another with their drinks	Food/ Drinks
want to be able to walk around with cocktails	Food/ Drinks
the no bringing in alcohol is stupid	Food/ Drinks
where to get the shuttle not well explained and the drop-off area too far.	Information
the website didn't offer alternate routes onto the island	Information
ticket seller and Fort Adams website said leashed dogs allowed and upon discovery they weren't one of the group had to stay in the car with the dog	Information
woman had small cooler and parking lot attendant said fine and then a later security guard (at the ticketing point) said no so they had to walk all the way back	Information
could not bring in cooler or leashed dog when no info stated that on the America's Cup site. Fort Adams website said leashed dogs allowed. Noticed other people with both coolers and dogs	Information
no clarity about policy on the hill above the fort. Parking? admission? food to bring in? (they wanted to know earlier what they should do)	Information
it was difficult figuring out where to buy tickets	Information
America's Cup was great, but despite what anyone says, there was not enough advertising, locally and nationally	Information
America's Cup website is poor. No info about this event	Information
one group came didn't know about parking or schedule and missed the races	Information
not enough messaging about sustainability (recycling, etc.) Messaging at both fort and in advertisements for the event	Information
group unclear about where to park so used 3 hour city parking in Newport and now are probably going to get a ticket	Information

parking and shuttle bus info and instructions vague and unclear	Information
as a retail shop owner in downtown Newport events make it difficult to know when to actually have the store open because people will be at the event not in Newport.	Information
no good coverage or information and even for sailors it's hard to find out much about the event	Information
the official store didn't know anything about race times or water taxi locations	Information
not enough programs to go around and tell people what's going on	Information
south African couldn't find any info online that was up to date. Wanted to know who won, what the standings were	Information
no info available for non-sailors through the event people. (group found out from knowledgeable people around them)	Information
hard to find the fort tour locations	Information
there needs to be better signage	Information
information could be clearer	Information
poor communication and info circulation among staff	Information
RIEDC shouldn't be spending money on surveys	Information
upset at \$10 parking fee when event was advertised as free	Parking
parking expensive, slow, and the directions were bad	Parking
parking too expensive	Parking
no incentive to see Newport because of ferry and city parking prices.	Parking
parking too expensive	Parking
\$20 parking is a lot	Parking
parking expensive	Parking
more bike parking	Parking
parking too expensive	Parking
people in parking lot during rainstorm: I'll never come to Fort Adams again	Parking
stuff is too expensive	Retail
sponsor shops didn't stock enough. Not enough sizes left	Retail
souvenirs aren't very good	Retail
while the event is here there isn't any boost for local businesses because people are at the event, not shopping	Retail
expensive bridge tolls could have a negative impact on tourism	Transportation
the water taxi was too expensive so they didn't take it.	Transportation

bridge tolls are outrageous	Transportation
traffic was bad	Transportation
construction on the Newport bridge during big events is ridiculous and bad planning on the part of the city	Transportation
tolls should be cheaper	Transportation
toll on the bridge hurts tourism	Transportation
bottleneck of cars make driving difficult	Transportation
ferry line too long	Transportation
complaint about downtown traffic	Transportation

Source: ACWS Newport, 2012 Visitor Survey, Planning Decisions, Inc.

Appendix Six: Report Authors



PROJECT MANAGER: Charles Lawton, Ph.D., Chief Economist, Planning Decisions, Inc.

Dr. Lawton has extensive experience in education, government and business. He specializes in development economics, economic and fiscal impact studies, strategic planning exercises and industry analysis. For eight years, he was a member of the Consensus Economic Forecasting Committee (CEFC) that advises Maine's Legislature and Governor with respect to economic and revenue forecasting and was a charter member of the Federal Reserve Bank of Boston's New England Public Policy Center Advisory Board. Chuck writes a weekly column on economics for the *Maine Sunday Telegram*. Dr. Lawton was principal author of both The Marine Trades in Rhode Island: A Skills Gap Analysis, February 1, 2008, conducted for the Rhode Island Marine Trades Association and Maine's Boat Building Industry: Obstacles & Opportunities, January 9, 2007, conducted for Maine Built Boats. He has extensive experience in conducting economic impact analyses using various versions of the IMPLAN model for county, state and regional impact areas.



PROJECT ECONOMIST: Charles Colgan, Ph.D., Professor of Public Policy & Management, Muskie School, University of Southern Maine.

Dr. Colgan has more than 35 years experience studying New England and its economy. His work has encompassed economic development, the environment and natural resources, transportation, housing, and demographics, with special attention to the economies of coastal regions. Dr. Colgan is the developer of the most comprehensive data series on the economies of coastal regions in the United States. The data are available nationwide through the Coastal Services Center of the National Ocean Service and through the National Ocean Economics Program, where Dr. Colgan serves as chief economist for market data. The data developed by Dr. Colgan has been used as a model for the study of coastal economies in a number of states and countries, including Ireland, France, and China. Dr. Colgan has led or participated in studies of coastal and marine economies in California, Florida, the Long Island Sound region in addition to Maine.